

To make Payments to companies that are registered in Edison as a **Bidder**, not a **Vendor**, you must use the Sourcing module. You have to start with an ePro req, copy it to a Sourcing Event, and enter the one Bidder. Note that you are doing the Sourcing Event to make a payment to a company not registered as a Vendor, only as a Bidder.

This Document assumes that you have created an eProcurement Requisition and attempted to create a Purchase Order from that requisition before finding that the company is not registered as a Vendor. *It may be necessary to cancel Purchase Orders created from your eProcurement Requisition before copying those Req Lines to the Sourcing Event.*

If you do not already have an **ePro requisition** created to pay your vendor, please create one using the **Special Request** tab, and give it the **LPA Doc Type**.

## **ePro Req**

Unless the Item being paid for must be tagged as an Asset, all payments to **Bidders** in the system will be done the same as a Local Purchase, using the **Special Request** tab in eProcurement.

For questions concerning the Local Purchase process, consult the Procurement Manual at <http://tn.gov/generalserv/cpo/documents/ProcurementManualv1.pdf>.

The **Local Purchase** section begins on page 96 of the Agency Procurement Manual, linked above. ***For the purpose of paying a Bidder, please ignore specific requirements that contradict these instructions.***

## **Sourcing**

Create a new Sourcing Event, as listed in the Agency Procurement Manual on page 107. Complete the Copying of Requisition Lines, using the previously-created Requisition. Change any necessary options in Step 1, and make sure all the Line data is correct in Step 2.

Then click the Bidder Invitations link, shown under **Step 3: Select Bidders to Invite**, detailed below.

### **Step 3: Select Bidders to Invite**

Send out targeted invitations to this event, designate it as a public event, or both.

[\\* Bidder Invitations](#)

## **Bidder Invitations**

- 1) Clicking the Bidder Invitations link under Step 3 on the main page goes to the **Invite Bidders** screen.

[Create an Event](#)**Invite Bidders**

Business Unit: 32101 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFX

☐ Public Event[Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

Select	Bidder ID	Bidder Type	Name	Dispatch Method
1 <input type="checkbox"/>				Email

[Search for Bidders](#)

Save Bidders as Group

Search UDDI Registry

2) Click the Search for Bidders link. [Search for Bidders](#) This will bring up the Bidder Search screen.

**Bidder Search**

Search Criteria			
Bidder Type:	<input type="text" value="Vendor"/>		
Name:	<input type="text"/>	State:	<input type="text"/>
ID:	<input type="text"/>	City:	<input type="text"/>
Contact:	<input type="text"/>	Country:	<input type="text"/>
Group ID:	<input type="text"/>	Postal:	<input type="text"/>
Group Name:	<input type="text"/>	Type:	<input type="text"/>
		SIC Type:	<input type="text"/>
		SIC Code:	<input type="text"/>
		Item ID:	<input type="text"/>

Maximum Rows retrieved:

Enter search criteria and press search to retrieve bidders.

3) Click the drop-down box at the top left, and change it from **Vendor** to **Bidder**.

<b>Bidder Search</b>	Bidder Type:	<input type="text" value="Vendor"/>
<b>Search Criteria</b>	Name:	<input type="text"/>
Bidder Type:	<input type="text" value="Vendor"/>	ID:

**Bidder Search**

Search Criteria
Bidder Type: <input type="text" value="Bidder"/>

The drop-down box should look like this:

Bidder Type:

There are two ways to search for a Bidder. By **Name** or by **Bidder ID**.

**Searching by Bidder Name:**

1) Click the Look-up Icon next to the **Company** field.

Company:

- 2) This will take you to the **Look Up Company** page.

## Look Up Company

**Search by:** Company Name begins with

**Look Up**

**Cancel**

[Advanced Lookup](#)

- 3) Click the **Advanced Lookup** link. [Advanced Lookup](#)

- 4) On the page that appears, change the drop-down box from **Begins with** to **Contains**.

Company Name:  to Company Name:

- 5) Type a few letters of the Company's name into the field, then press the **Look Up** button.

Company Name:

- 6) This will bring up a list of companies. Click the blue link that corresponds to the Company.

[Company Name](#)

[Jeffery W. George Construction](#)

- 7) This will return you to the main page. Click the yellow **Search** button.

**Search**

- 8) Clicking Search will bring up the Bidder, as shown below. Check the **Invite** box.

**Recommend Bidders**

Maximum Rows retrieved:

**Search**

[Select All](#) [Deselect All](#)

Search Results			
		<a href="#">Customize</a>   <a href="#">Find</a>   <a href="#">View All</a>	First <input type="text" value="1 of 1"/> Last
Bidder ID	Name	Bidder Company	Invite
1 0000000810	Jeffery George	Jeffery W. George Construction	<input type="checkbox"/>

Becomes

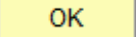
[Select All](#) [Deselect All](#)

Search Results			
		<a href="#">Customize</a>   <a href="#">Find</a>   <a href="#">View All</a>	First <input type="text" value="1 of 1"/> Last
Bidder ID	Name	Bidder Company	Invite
1 0000000810	Jeffery George	Jeffery W. George Construction	<input checked="" type="checkbox"/>

**OK**

**Cancel**

**Refresh**







Click the **OK** () button at the bottom of the screen. This will return you to the main Invite Bidders page.

## Create an Event

### Invite Bidders

Business Unit: 32101    Event ID: NEXT    Round: 1    Version: 1    Event Format: Buy    Event Type: RFx

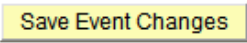
☐ Public Event

Customize   Find   View All    First  1 of 1  Last				
Select	Bidder ID	Bidder Type	Name	*Dispatch Method
1 <input type="checkbox"/>	0000000810	Bidder	Jeffery W. George Construction	Email   



[Search for Bidders](#)

[Save Bidders as Group](#)

Search UDDI Registry



[< Return to Event Overview](#)

GoTo:   

After the bidder is selected, click the Return to Event Overview link.

[< Return to Event Overview](#)


### Searching by Bidder Id

Obtain the company's **Bidder ID** from them.

- 1) Type the ID (generally three or four digits) into the **ID** field. Then add 0s in front of it until it becomes a 10-digit number.

ID:   becomes ID:  

Add 0s until it looks like:

- 2) Use the Lookup Icon located by the ID Field () to pull up a list of Bidders. Since you've put in the Bidder ID, this should only return the correct one. Click the blue link of the correct name.

## Look Up ID

Search by:  begins with

[Look Up](#)[Cancel](#)[Advanced Lookup](#)

### Search Results

View All First  Last

Bidder ID	Company Name
0000000810	Jeffery W. George Construction

3) This will return you to the main page. Click the yellow **Search** button.

[Search](#)

4) Clicking Search will bring up the Bidder, as shown below. Check the **Invite** box.

[Recommend Bidders](#)

Maximum Rows retrieved:

[Search](#)[Select All](#) [Deselect All](#)

Search Results			
<a href="#">Customize</a>   <a href="#">Find</a>   <a href="#">View All</a>   <input type="button" value="1 of 1"/> First Last			
Bidder ID	Name	Bidder Company	Invite
1 0000000810	Jeffery George	Jeffery W. George Construction	<input type="checkbox"/>

Becomes

[Select All](#) [Deselect All](#)

Search Results			
<a href="#">Customize</a>   <a href="#">Find</a>   <a href="#">View All</a>   <input type="button" value="1 of 1"/> First Last			
Bidder ID	Name	Bidder Company	Invite
1 0000000810	Jeffery George	Jeffery W. George Construction	<input checked="" type="checkbox"/>

[OK](#)[Cancel](#)[Refresh](#)

Click the **OK** ([OK](#)) button at the bottom of the screen. This will return you to the main Invite Bidders page.

[Create an Event](#)**Invite Bidders**

Business Unit: 32101 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFx

☐ Public Event

Customize   Find   View All   First 1 of 1 Last				
Select	Bidder ID	Bidder Type	Name	*Dispatch Method
1 <input type="checkbox"/>	0000000810	Bidder	Jeffery W. George Construction	Email <input type="button" value="Print"/>

[Search for Bidders](#)[Save Bidders as Group](#)

Search UDDI Registry

[Save Event Changes](#)[< Return to Event Overview](#)GoTo:  

5) After the bidder is selected, click the Return to Event Overview link.

[< Return to Event Overview](#)

Review the event one final time for correctness, paying special attention to the Event Lines and the Bidder Invitations. Set the Event Start Date and End Date at the top of the main Event Summary page.

When the final review is complete, press the Post button to route the event for approvals.

**Step 5: Post Event**

When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

[Save Event](#)[Post](#)[Save As Template](#)[Preview PDF](#)

Once the Event is Approved, you must record the Bidder's Bid.

**Bidding and Entering Bids on Behalf of Vendors****Entering Bids on Behalf of Bidder:**

- 1) Select the Sourcing option from the menu, then Event Responses. Click the Create Bidder Response link.



- 2) Select the appropriate Business Unit and Event ID for the Event that was bid on. Press the Search Button, and then scroll through the Events listed until the Event is found. It will display one blue link for every Bidder that was sent an invitation on that event, in order of the event numbers.

Search Criteria

Search: \_\_\_\_\_

*Business Unit: 32101	Bidder Type: _____
Event ID: _____	Bidder Setid: _____
Event Format: _____	Bidder ID: _____
Event Type: _____	Name: _____
Event Name: _____	Contact Name: _____
Search	

Event ID: 0000000245	Bidder Setid: _____
Event Format: _____	Bidder ID: _____
Event Type: RFx	Name: _____
Event Name: _____	Contact Name: _____
Search	

Search Results							
				Customize	Find	First	1-2
Event ID	Event Name	Round	Version	Name	Bidder Type	Setid	Bidder ID
<a href="#">32101-0000000245</a>	Testing of Bid responses	1	1	Windham Professionals Inc	Vendor	SHARE	0000000080
<a href="#">32101-0000000245</a>	Testing of Bid responses	1	1	AAA Inc.	Vendor	SHARE	0000094116

- Click the blue link for a Bidder on the event to bring up the "Enter Bid on Behalf of..." screen for this Event, for the selected Bidder. It will fill in the name of the selected Bidder at the end of the screen name.
- Press the Enter a New Bid button. Enter a New Bid This opens up the Event Details screen, where the information from the bid can be entered on behalf of the Bidder.

### Event Details

<a href="#">Submit Bid</a>	<a href="#">Save for Later</a>	<a href="#">Validate Entries</a>
----------------------------	--------------------------------	----------------------------------

<b>Event Name:</b>	239.08 Exceptions to Terms	<b>Bid ID:</b>	New
<b>Event ID:</b>	32101-0000000063	<b>Bid Date:</b>	
<b>Event Format/Type:</b>	Sell Event RFx	<b>Bid Currency:</b>	USD US Dollar
<b>Event Round:</b>	2		
<b>Event Version:</b>	1		
<b>Event Start Date:</b>	08/04/2008 5:00PM CDT		
<b>Event End Date:</b>	Event Completed		

[View/Add General Comments and Attachments](#)

[Hide Additional Event Info](#)

- Enter the Bid Quantity and Bid Price for each line and repeat for all lines, scrolling down the page.

**Step 2: Enter Line Bid Responses**

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

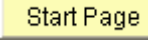
**Lines in This Event:** 1

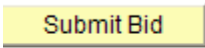
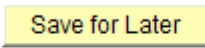
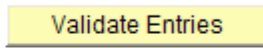
**Lines That Require a Response:** 1

**Your Total Line Pricing:** 3,600.0000 USD

[Hide Line Detail](#)

★ Bid Required		Line Comments/Files		Previous Lines 1 of 1 Next Lines		
Line	Description	Unit	Requested Quantity	Your Bid Quantity	Your Unit Bid Price	Your Total Bid Price
1 ★	Widget	EA	6.0000	6.0000	600.000000	3,600.0000 USD

- 6) After Line Bid Responses are entered, click the Start Page button to return to the Event Details page. 
- 7) Once all information has been entered and verified as correct, press the Submit Bid button to submit the Bid on behalf of the Bidder.

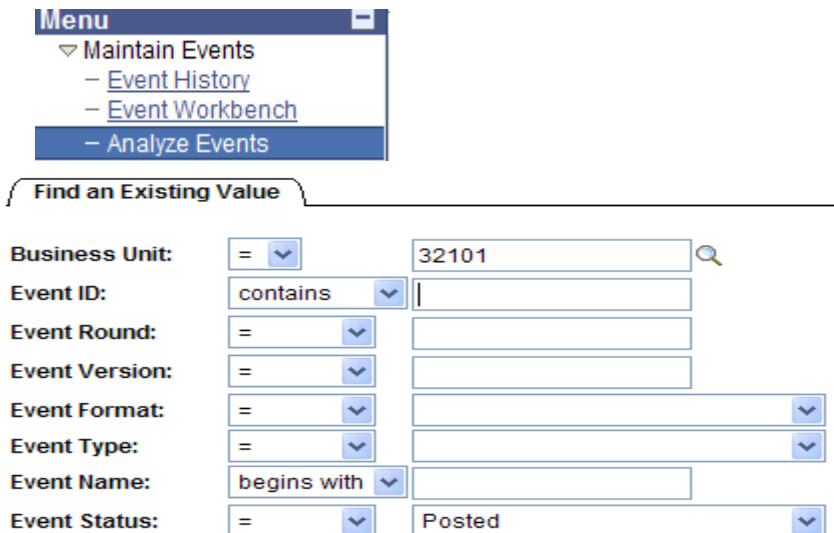
[Return to Create Bidder Response](#)

A message will pop up asking if the user is done making changes to the bid. If everything is **completed and correct**, select the Yes button. **Once Yes is selected, no further changes can be made unless the “Allow Edit of Bids” box is checked.**

## Evaluating and Awarding Sourcing Events to selected Bidders

Analyzing Bids and Awarding to Vendor:


1. Select Sourcing from the menu, then the Maintain Events link. Click the Analyze Events link and search for the correct Event ID or type the exact Event ID number into the Event ID field. If it is not known, search by Event status: Posted and Business Unit.



**Menu**

- ▼ Maintain Events
  - [Event History](#)
  - [Event Workbench](#)
  - [Analyze Events](#)

**Find an Existing Value**

Business Unit: =  

Event ID: contains

Event Round: =

Event Version: =

Event Format: =

Event Type: =

Event Name: begins with

Event Status: =

2. When the correct Event ID is found, click the blue link with the Event's number under the Event ID column.

### Search Results

[View All](#) [First](#)

Business Unit	Event ID	Event Round	Event Version	Event Format	Event Type	Sealed Event	Event Name	Event Status
<a href="#">32101</a>	<a href="#">0000000298</a>	<a href="#">1</a>	<a href="#">1</a>	<a href="#">Buy</a>	<a href="#">RFx</a>	<a href="#">N</a>	<a href="#">Request for Bid, Widgets</a>	<a href="#">Posted</a>

3. Clicking the link will take you to the main Analyze Events page, starting on the Analyze Total



tab. At the start, only the first two bids will be visible. By scrolling to the right using the scrollbar at the bottom of the screen, you can see more of the Bids. The Analyze Total page lists information about the bid as a whole.

### Analyze Events

Analyze Total [Analyze Line](#) [Review Constraints](#) [Review Award Recommendation](#) [Award Summary](#) [Award Details](#)

Business Unit: 32101 Event ID: 0000000298 Round: 1 Version: 1 Event Name: Request for Bid, Widgets

Event Format: Buy Event Type: RFX Currency: USD End Date: 12/09/2008 10:25AM CST Status: Pend Award Go To:

**▼ Bid Analysis and Display Options**

Header Weighting:  Sort Bids By: Total Event Score  Sort Order: Descending  [Analyze](#)

Display Options:  View Factor Responses  ☐ Display Delta Responses ☐ Display Disqualified Bids ☒ Display Withdrawn Bidders

View Bid Actions: ☒ All Bid Actions ☐ Award ☐ Counter ☐ Disallow ☐ Reject ☐ <No Action>

**Analysis**

Bidder Name	<a href="#">Windham Professionals Inc</a>	<a href="#">The Equitable</a>	<a href="#">Delta Management Assoc</a>
Event Version:	1	1	1
Bid Number:	1	1	1
Total Bid Amount:	2970.0000	3060.0000	3600.0000
Total Bid Cost	2970.00	3060.00	3600.00
Total Event Score:	100.0000	85.7000	0.0000
Total Header Cost	0.00	0.00	0.00
Total Header Score:	0.0000	0.0000	0.0000

### Bid Analysis:

**Total Bid Amount:** You can view the total price Bid by looking at the **Analysis** section on the **Analyze Total** page. The **Total Bid Amount** row shows the combined price the Bidder has bid on all the lines.

Total Bid Amount:	2970.0000	3060.0000	3600.0000
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- To Award an event, go back to the main Analyze Total page. Select Award from the Bid Action drop-down menu, located under the bidder's header. Enter 100 in the Award by Percent field, under the column of the winning Bidder.

Bid Action	NA <input type="text"/>	NA <input type="text"/>	NA <input type="text"/>
Reject Reason Code:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Award by Percent:	<input type="text"/>	<input type="text"/>	<input type="text"/>

<div> <div>NA</div> <div> Award Counter Disallow NA Reject </div> </div>	<div> <div>Award</div> <div> <input type="text"/> <input type="text"/> </div> </div>
--	--

- Save the Award, using the button at the bottom of the page.
- Click the Award Details link at the top of the page. Select Award Type from the drop-down menu. To award to a PO, select Purchase Order from the drop-down, though it should default to that.

▼ Show Award Details to Bidders

☒ Display bids  
 ☒ Display all bids  
 ☒ Display bid scores  
 ☒ Display bid's total bid price  
 ☒ Display factors

**Award Details** First 1 of 1

Bidder Name: [Windham Professionals Inc](#)  
 Bidder Type: Vendor  
 Buyer:

Award Type: Purchase Order  
 Award Currency: Event USD  
 Terms:

PO Business Unit:

Award Number: 1  
 Total Award: 5001.0000

Award Type: Purchase Order

Award Number: Purchase Order

Award Lines: Single Release PO Contract

4. Once Purchase Order has been selected from the Award Type drop-down, type in the Business Unit the PO is for, if it did not default in.

PO Business Unit: 32101

5. After the Award Type and PO Business Unit have been filled in, click the Submit button at the bottom of the page. **Submit** This routes the Award for approval.

**Award Details** First 1 of 1 Last

Bidder Name: [Windham Professionals Inc](#)  
 Bidder Type: Vendor  
 Buyer:

Award Type: Purchase Order  
 Award Currency: Event USD  
 Terms:

PO Business Unit:

Award Number: 1  
 Total Award: 495.0000

**Award Lines**

Line	Item ID	Vndr/Item Rel	Item Description	UOM	Award Quantity	Awarded Price	Extended Price
1		<input checked="" type="checkbox"/>	<a href="#">Widget</a>	EA	6.0000	495.0000	2970.0000

**Post Award**

Approval Status: Initial

**Approve**  
**Pushback**  
**Deny**  
**Submit**

### For Approvers:

6. Navigate back to the Analyze Events link. Search for the Event with the Award to be posted, and click the Event ID's link.
7. The approver will press the Approve button on the Award Details page after reviewing the award choice.

Approval Status: In Process

**Approve**  
**Pushback**  
**Deny**  
**Submit**

Posting Awards:

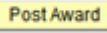
- 1) Navigate back to the Analyze Events link. Search for the Event with the Award to be posted, and click the Event ID's link.

**Search Results**

View All

First 1-6 of 6 Last

Business Unit	Event ID	Event Round	Event Version	Event Format	Event Type	Sealed Event	Event Name	Event Status	DateTime Finished
32101	<a href="#">0000000482</a>	1	1	Buy	RFX	Y	<a href="#">Pants</a>	Posted	12/11/2008 10:54AM
32101	<a href="#">0000000481</a>	1	1	Buy	RFX	Y	<a href="#">Tillers, Rotary, 3-Pt Hitch</a>	Pend Award	12/11/2008 11:00AM
32101	<a href="#">0000000480</a>	1	2	Buy	RFX	Y	<a href="#">Widgets for Repairs at TN Tower</a>	Pend Award	12/11/2008 1:05PM

- 2) Once the approval process is complete, the Award can be posted. To do so, press the Post Award (  ) button, located on the Award Details screen. After the Post Award button is pressed, you will be taken to the **Purchase Order** screen.
- 3) Details on how to create a Purchase Order from a Sourcing event are covered in the [Agency Procurement Manual](#) beginning in the middle of page 123.

**Banking and Payment**

Awarding to a Bidder pulls their information into the Vendor File. However, a Payment Hold is placed on their account. To remove this hold, some additional information must be provided to Division of Accounts, Vendor Maintenance.

The necessary information is provided by filling out the **W-9** and **ACH** forms that are currently in use by the Agencies. ***Please provide your Bidder with an ACH Form and W-9 Form.***

Instruct your Bidder to fill out the forms and return them to the Division of Accounts, Vendor Maintenance section.

**Division of Accounts, Vendor Maintenance**

14<sup>th</sup> Floor, William R. Snodgrass Tower

312 Rosa L. Parks Avenue

Nashville TN, 37243

**E-Mail:** [vendormaint@tn.gov](mailto:vendormaint@tn.gov)

**Fax:** 615-532-2332

**Phone:** 741-9745.

**Please put "Bidder to Vendor conversion" in the subject line of the e-mail. Include the Bidder ID in the body of the e-mail. Or if faxing/mailing, attach a cover sheet with this information.**